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AUTOMOTIVE MARKETING

The Marketing Business Magazine For The Retail Aftermarket

MARCH 1990

7TH ANNUAL
**CONSUMER
AUTOMOTIVE**

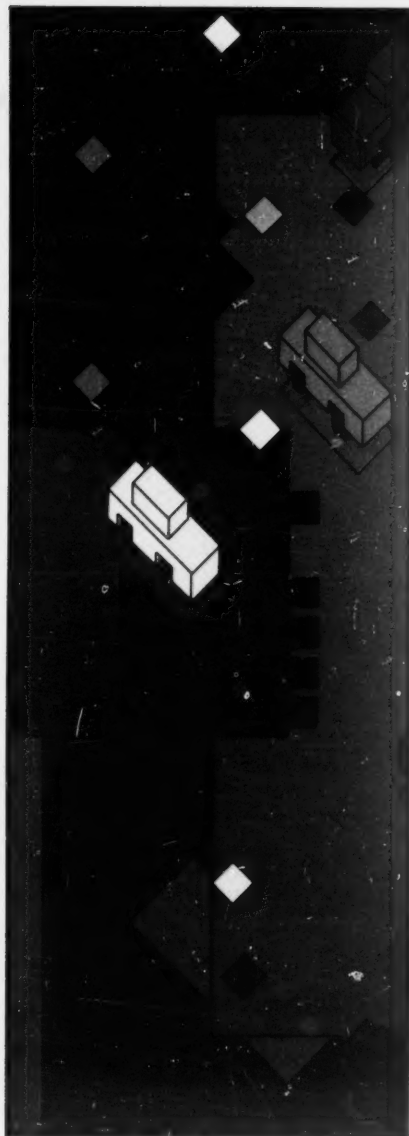
CARS = CONSUMER
RESEARCH

DIY ACTIVITY & PURCHASES
REMAIN STEADY INTO
THE 1990s

WHO IS
THE BIGGEST
JOBBER/RETAILER?

AM's NEW SPECIAL
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AUTOMOTIVE MARKETING



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MARKET LINE

Genuine Parts Largest Store Owner On Top 50 Jobber/Retailer List

As a supplement to *Automotive Marketing's* annual list of the top 100 retail chains (the latest appeared in October 1989), we've put together a list of the leading traditional jobbing store chains.

While some of these jobber chains are just as large as, or larger than, the top chains on our retail chain list, they differ in one important way: a traditional jobber's primary business is selling parts wholesale to installers such as gas stations, garages, and specialty shops.

However, although wholesale sales to

installers is the primary business of the jobber chains on this list, it's important to remember that these stores also sell parts at retail to DIYers. If you're selling water pumps, for instance, your competition is anyone who sells water pumps. And, any one of the chains on our list will sell a water pump to a DIYer.

The Average Jobber

The latest Motor Equipment Manufacturers Association (MEMA) Jobber Study measures the average jobber's retail sales

at 36%. Taking Genuine Parts \$500 million in owned store sales for an example, 36% of that is \$180 million, a substantial retail sales volume. In addition, many of these chains, especially those connected with programmed distributors, have made substantial strides in recent years to upgrade their stores and counterhelp to be DIYer-friendly.

Although the number of jobber stores steadily declined in the 1980s, jobber stores still represent the single largest segment of auto stores by far. In developing its latest membership directory (due out about the time of the April Big "I" Show), the Automotive Service Industry Association (ASIA), Chicago, tallied 26,200 job-

AUTOMOTIVE MARKETING'S TOP 50 JOBBER/RETAILER CHAINS

Rank	Chain	# of Stores	\$ Sales (\$+000)	CEO	Store Address and Phone	DIY
1.	Genuine Parts (NAPA)	570	500,000	Larry L. Pinco	2019 Circle 75 Hwy, Atlanta, GA 30339 (404) 953-1700	
2.	Parts Inc. TM	203	168,000	Mike Omden	401 S. Dudley, Memphis, TN 38104 (901) 523-7711	
3.	Fisher Auto Parts	150	45,000	Art Fisher	512 Greenville Ave., Houston, TX 77001 (713) 685-6901	
4.	Mac Auto Parts	144	45,000	Jackie Saly	Box 4230, Doverport, PA 12608 (519) 323-3441	
5.	APS (Big A)	113	72,000	Richard J. Spelber	3900 Powers St., Houston, TX 77054 (713) 741-2470	
6.	General Parts (Carquest)	102	69,000	Namya Sloan	2435 Millbrook Rd., Raleigh, NC 27604 (919) 874-9842	
7.	Strous-Frank Co. (Carquest)	92	70,000	David Strous	Box 490, San Antonio, TX 78292 (512) 341-6531	
8.	Republic Auto TM	74	44,000	John Thompson	Box 2094, Brentwood, TN 37024 (615) 373-6276	
9.	Hahn Automotive Wares TM	74	41,000	Mike Fulsman	415 W. Main St., Rochester, NY 14620 (716) 235-1890	
10.	Parts Depot/Beego Auto Parts	72	40,000	Baltimore Olson	2177 Dale Ave., Roanoke, VA 24015 (703) 345-1001	
11.	Crow-Burlingame	70	36,000	Fletcher Lord, Jr.	520 W. Capitol, Little Rock, AR 72203 (501) 372-8276	
12.	Boots Auto Parts/Supply	60	27,000	Don D. Boots, Jr.	482 S. Pelham Ave., Douglas, GA 31533 (913) 384-7616	
13.	Anderson Auto Parts	56	19,000	H.R. Anderson II	Box 767, Anderson, SC 29622 (803) 234-4321	
14.	Main Auto Parts	56	16,000	Paul Vagstad	1422 N. Main St., Dayton, OH 45406 (513) 277-7390	
15.	Al Automotive TM	51	16,000	Bill Baker	514 Corporate Center, Bldg. 200, Nashville, TN 37217 (615) 267-2490	
16.	Northern Auto Supply Co.	50	11,000	Don Borch	1904 N. Peach St., Milwaukee, WI 53207 (715) 384-2154	
17.	J. Budman Auto Parts	38	6,000	Samuel Budman	801 N. Portland St., Memphis, TN 38104 (901) 685-3767	
18.	Automotive 1 Parts Store	28	16,000	Robert H. Gentry II	701 W. Church St., Orlando, FL 32801 (407) 432-1100	
19.	Corda (Carquest)	27	16,000	Ken Walker	4390 E. Alondra Blvd., Carlsbad, CA 92008 (619) 936-4492	
20.	BM (Bop Gear) Automotive Parts	26	24,000	SC Lynch	12142 Alondra Blvd., Carlsbad, CA 92008 (619) 936-4492	
21.	Barber Motor & Parts	26	20,000	Robert E. Barber, Jr.	210 E. Sunset St., Wilson, NC 27603 (919) 243-2147	
22.	Superior Auto (Dodge & Wilmer NAPA)	26	17,000	Gary Davis	689 Spauld Dr., Pittsburgh, PA 15226 (412) 943-7774	
23.	William Auto Parts	23	16,000	Michael William	Box 76, Rockford, IL 61221 (815) 786-3902	
24.	Allied Auto Parts Co.	23	16,000	Daniel Bernal	43 N. Montello St., Brooklyn, MA 01901 (508) 586-9200	
25.	ABC Auto Parts Co.	23	12,000	Charles Bernal	620 Montello St., Brooklyn, MA 01901 (508) 586-9200	

MARKET LINE

ber stores and 13,760 owners. About one-half of the owners, according to ASIA, run one and two-store operations.

The stores on our list of the Top 50 total 2,521. Thus, the 50 chains on our list represent not quite 10% of the total jobber store population.

The list also speaks to the continuing consolidation in the traditional market. For example, an amazing number of chains listed in industry guides only two and three years ago are either out of business through bankruptcy or have been absorbed into larger operations. To cite just two large chains: Kentucky Jobber Supply, which owned over 30 Womwell Auto Stores, was bought by General Parts in 1988, and Mid-America (Green Light jobbers) with over 60 stores was acquired by Parts Inc. in the same year.

With all the consolidation, there are six jobbing chains on the list that would qualify as megachains (more than 100 stores). The three biggest jobber chains are all rapidly growing.

Probably to no one's surprise, the leading jobber store owner is Genuine Parts, Atlanta, the major player in NAPA distribution, with 570 owned stores. Genuine Parts has been actively increasing its number of owned stores, especially in metropolitan markets, for some years

now. Geographically, Genuine Parts is hard to pin down. The company operates 61 distribution centers in the 48 continental United States.

We should also note that three of the other four NAPA WDs also own stores. Davis and Wilmar, Pittsburgh, owns 26 Superior Auto Stores and Brittain Brothers, Oklahoma City, OK, owns 16 Brittain Brothers NAPA stores. The fourth, Quaker City Motor Parts, Middletown, DE, provides 51% ownership for some 77 Pennsylvania, New Jersey, and Delaware NAPA jobbers, although the stores are operated by the minority owners.

The number two and number three chains are also key parts of programmed distribution groups. The number two chain, owned by Parts Inc., Memphis, is the key WD in the AAAD/Parts Plus program. Parts Inc. has been gobbling up Southeastern independents in recent years. In 1988, it bought the Mid-America Green Light jobber operation; in 1989, it added five small chains. As 1990 began, Parts Inc. planned to acquire Al Automotive's Southeastern Div. (warehouses and stores in Chattanooga, TN, Birmingham, AL, and New Orleans). As part of its acquisitions, Parts Inc., has purchased two retail chains (National

Auto Superstores and Save Auto Stores) which operate as a separate retail division.

The number three chain is Art Fisher's Fisher Auto Parts, Staunton, VA. Fisher Auto Parts is also the founder of the Federated program for independent WDs across the country. Its jobber division, Fisher Auto Parts Stores, has been acquiring smaller chains from Virginia to Pennsylvania in recent years. Its latest major acquisition was the 21 Automotive Supply Stores and warehouse headquartered in Altoona, PA.

The remaining traditional megachains differ slightly. Number four Sieg Auto Parts, Davenport, IA, is a quietly growing Midwestern jobbing chain that added four stores as we prepared our list. Number five APS, Houston, which also owns the Big A jobber program, went through an LBO (leveraged buyout) in 1989 by its management led by president Richard Spellari and financed by the New York investment firm of Clayton & Dubilier. Spellari is a NAPA veteran and plans to expand the APS program. Finally, General Parts, Raleigh, NC, the sixth largest owner of jobber stores, is quietly becoming a national WD with owned distribution centers and jobbing stores in Kentucky, Minnesota, and Montana. ■

AUTOMOTIVE MARKETING'S TOP 50 JOBBER/RETAILER CHAINS

Rank	Chain	# of Stores	\$ Sales (\$-000s)	CEO	Address and Phone	OW
26.	Himal Auto Parts/Motor Supply	23	11,000	Himal Family	1215 E. Main, New Iberia, LA 70560 (318) 364-7201	
27.	Keenan Auto Parts	22	13,000*	Frank Anouse	112 N. Front St., Albany, GA 31703 (912) 436-3311	
28.	686 Parts Service, Inc.	22	16,300	George E. Mobu Jr.	9124 Green Springs Rd., Baton Rouge, LA 70814 (804) 924-4888	
29.	Brich Auto Parts	21	15,000	Nelson August Jr.	Box 277, Albany, NY 12201 (518) 449-1176	
30.	Motor Bearings & Parts Co.	21	12,000	Bill White	427 S. Dawson St., Raleigh, NC 27602 (919) 832-3961	
31.	BWP (Corquest)	21	11,000*	Nell Stohal	1055 Bank River Ave., Bronx, NY 10472 (212) 991-9000	
32.	Shedwards Inc.	20	14,000	Jack Shedwards	Box 946, Sioux Falls, SD 57101 (605) 336-0676	
33.	All State Auto	20	10,000	Warren Morgan	3434 N. I-40 Service Rd., Metairie, LA 70002 (504) 834-5500	
34.	Automyle	20	4,000	David Stucky	Box 678, Hemingway, SC 29554 (803) 688-3914	
35.	Arnold Motor Supply	19	14,000	Gordon Odeh	110 W. 4th, Box 8038, Spokane, WA 99201 (509) 325-4287	
36.	Interstate Auto	19	11,000	J. Lon Schuster	311 E. Ohio, Elizabethtown, NY 47051 (802) 765-6163	
37.	Main Auto	19	9,000	Carl E. Main	3896 Union Rd., Rutland, NY 14828 (716) 633-4486	
38.	Flowers Auto Parts	19	11,000	John R. Flowers	408 S. Center St., Hickory, NC 27603 (704) 323-6414	
39.	Lois's Auto Parts	19	10,000	John Lois	404 NE Ford St., Dallas, TX 75209 (214) 467-3541	
40.	AS-Car Automotive Centers	18	11,000*	Las Cigal	1820 S. Superior, Box 27, Arlington, VA 22209 (703) 465-3791	
41.	Syds Auto	18	11,000*	Stan Syds	242 N. Main St., Burlington, NC 27215 (919) 234-0344	
42.	National Auto Supply	17	8,000*	Clifford Shortfield	8914 Sager Rd., St. Louis, MO 63144 (314) 968-0511	
43.	Parker Auto Supply	17	11,000*	W.W. Parker	Box 362, Sumter, SC 29161 (803) 775-4721	
44.	Hopco Auto Parts	17	10,000	Richard Hopson	Box 324, Hayslip, MA 01041 (618) 536-2280	
45.	Rockwell's	17	11,000	Charles A. Rockwell	16 W. Main, Richmond, VA 23274 (813) 918-7625	
46.	OK Auto & Motor Co.	17	8,500	William Larson	605 Elm St., Ephraim, MI 49829 (504) 365-5191	
47.	NE Swanson Auto	17	8,000	Mike Sand	2904 Gateway Dr., Grand Forks, ND 58201 (701) 772-4839	
48.	Acme Auto	17	6,000*	Curt Myers	1731 S. 19th St., Harrisburg, PA 17104 (717) 638-7993	
49.	Brittain Brothers (NAPA)	16	13,000*	Robert Saunders	Box 25421, Oklahoma City, OK 73125 (405) 234-1768	
50.	Blankenship Auto	16	8,500	Earl Penschbacher	704 W. Main St., Marion, IL 62959 (618) 993-2643	

*Automotive Marketing estimate

*Sales reported under various names

A Census Of Automotive Service

By Edward L. Kaufman,
Contributing Editor

You know that 1990 is a census year. Did you ever wonder what the Bureau of Census does in between these once-every-ten-years censuses of people? Why, it counts business establishments; like automotive retailers, automotive wholesalers—and automotive service establishments.

In fact, one of the few relatively good sources of data on the operations of garages, body shops, and automotive repair specialists is found in what is now called, *The Census of Service Industries*. These censuses are conducted every five years and reported out after two years of analysis.

The first data from the *Census of Service Industries* report shows that receipts of general repair shops increased 72% between 1982 and 1987. This resulted both from increases in the number of shops (51,099 in 1987 versus 40,389 in 1982) and in average revenues per shop. In 1987, the average general repair shop had receipts of \$201,573 versus only \$147,763 in 1982.

The results for automotive service specialists were mixed. Surprisingly, only exhaust system repair shops had faster growth in numbers of outlets and receipts than general garages. According to the Census, the number of muffler specialists increased 54.9% between 1982 and 1987. Their average revenues per shop increased from \$259,135 in 1982 to \$298,730 in 1987.

We believe that the growth in receipts of garages reflects two things. First, the number of garages has increased as a result of reclassification. That is, thousands of ex-gasoline dealers have become de facto garages. They didn't enter the business as a fabulous new opportunity. Second, with demand for services high, their labor rates have shot up. However, their average receipts per shop continue to be well below those of the service specialists as a whole. For example, in 1982, when the average garage grossed \$147,763, the average receipts of all service specialists (including muffler shops, glass shops, transmission shops, radiator repair shops, brake/front end specialists, ignition and fuel system specialists, etc.) was \$206,340. And in 1987, when the average receipts of garages rose to \$201,573, the average receipts for all service specialists rose to \$261,591.

The chart shows data from the 1987 Census of Service Industries. We have to point out that not everyone agrees with the Census data. For example, the 1987 Census says that there were 6,335 transmission repair shops in 1987, up from 5,701 in 1982. According to some observers of that industry, there are about 10,000 transmission repair shops in the U.S., but the numbers have actually declined from 12,000 and more a few years ago. Why? Because qualified technicians are becoming harder to find and because the current technology requires a broader inventory. Also, some shop owners have left the business due to their fears of electronically controlled transmissions.

All of this suggests that there must be a great opportunity out there for the small number of shops which are capable of

repairing modern high-tech transmissions.

Some other interesting data from the 1987 Census: the relatively slow growth for radiator rebuilders and brake and front end specialists. The first point is not surprising; rebuilders have lost sales to jobbers and chain stores because of a movement to selling complete replacement radiators as opposed to rebuilding. The second point is interesting because of the interest of service merchandisers generally (including parts stores like Western Auto, merchandisers like Sears and Wards, tire company stores, and muffler specialists) in total undercar services. These services include brakes, shocks and wheel alignment services. According to the Census data, brake and front end specialists are among the slower categories of automotive service specialists.

The Census data have to be read with caution and interpreted thoughtfully. For example, while it appears to be true that there are about 4,900 muffler specialists in the U.S., and that their number rose between 1982 and 1987 (because aggressive new franchises like Speedy Muffler King and continued expansion by Midas and Meineke), in the number of outlets has slowed considerably since 1987. ■

DOC Says 46,000 Retail Auto Stores

We're often asked: "How many auto parts stores are there?" It's a good question, and we wish we had a good answer. We can tell you that the top 100 automotive retailers operate 6,135 stores (See the Top 100 Retailer List in the October 1989 *Automotive Marketing*).

We can also tell you that 60,290 outlets are listed in the Yellow Pages across the country under the heading "Auto Parts And Accessories-New." This information comes from American Business Information, Omaha, NE, a company that collects Yellow Page data. This company also lists 109,423 service stations, 27,780 new car dealers and 185,363 auto repair shops.

While these are actual counts, most estimates of the total number of stores by aftermarket analysts, trade magazines or trade associations by necessity have to work from projections and samples. No one has the time or money to go out and count each store, except perhaps the Internal Revenue Service.

Number of Establishments	Receipts (\$000)	Payroll (\$000)	No. Estab's	Receipts	Payroll
4,910	\$1,466.8	372.4	9.1	12.0	13.1
3,534	1,278.0	315.9	5.0	11.0	6.5
6,335	1,394.0	417.3	2.1	6.7	5.6
2,979	566.6	146.4	2.3	5.4	4.2
3,236	635.5	286.4	1.6	6.2	5.6
2,262	446.8	134.3	1.9	4.8	5.1
1,114	337.8	91.3	3.4	5.2	4.2
24,372	\$6,575.5	\$1,743.8	3.3	6.4	7.8

MARKET LINE

However, the U.S. Department of Commerce, takes an Economic Census of Retail Trade every five years. Among the counts are wholesalers of motor vehicle supplies and new parts and auto and home supply stores.

The 1987 Economic Census counted 28,902 wholesalers, compared with 28,712 in 1982, for a gain of 190 in five years. This figure includes any store that sells automotive parts on a wholesale basis—which means it's mainly comprised of jobbers and WDs.

On the retail side, the number of retail auto and home supply stores increased dramatically between 1982 and 1987, according to the Economic Census. Officially, the 1987 Economic Census counted 46,207 auto and home supply stores, an increase of 5,311 since the 1982 Economic Census. The category is subdivided into tire, battery and accessory dealers (41,590 stores) and other auto and home supply stores (4,517).

SUPPLIERS

Suppliers See Good 1990 Spring Sales

Cold weather in December should get the the 1990 spring selling season off to a good start, according to several after-market suppliers.

Roger McCabe, president and CEO of Dorman Products, Cincinnati, said that Dorman Products will see a positive spring impact just like the entire marketplace. "WDs have moved a lot of inventory in January and as a result are ready to market spring lines with more enthusiasm and financial support."

"As the thermometer goes down, many parts fail in the extreme cold," Bruce Tartaglione, vice president marketing BWD Automotive Corp., Franklin Park, IL, said. "BWD's sales force was quick to aid the WD in stocking parts such as battery cables, wire sets, timing belts, ignition modules and coils, temperature sensors, emission control parts such as choke thermostats and-choke pull-offs, fuel pumps, water pumps, and clutches."

Traditional cold weather items like wipers and batteries ended 1989 with strong sales. "Our snow blade sales tripled," Rod Longman, president of Pylon Mfg. Co., Deerfield Beach, FL, said. "Now that spring is here, it's time for all those snow blade users to replace them."

And, Joseph N. Calio, vice president of

marketing for Exide Corp., Reading, PA, said, "We usually look for our battery sales to get their cold weather boost in January or February; but when it came in December it had a positive impact."

According to Norman E. Dobrowski, director of exhaust marketing services for Maremont Corp., Carol Stream, IL, "Exhaust sales should have a strong spring as a result of December's below zero temperatures. During the winter weather months, exhaust systems are exposed to winter salt which causes external corrosion and a greater amount of condensation occurs within the muffler. This causes the muffler and exhaust system to wear out faster than they would under normal driving conditions."

Frank Erickson, president of International Lubricants, Inc., Seattle, WA, said, "Sales increased sharply in the last few months because cold weather as severe as this tends to bring on many more transmission failures. Cold spells also wreck the fluid in the transmission."

"The cold weather of December places a greater stress on lights and bulbs," said Scott Weisar, marketing manager for Peterson Mfg. Co., Grandview, MO.

"Often while driving in the winter, people drive into snow banks and damage their lights or use their lights for prolonged periods of time and place greater wear on the bulb. Peterson foresees a strong spring sales period."

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(Circle 16 on Product Information Card)

INTRODUCTION

CONSUMER AUTOMOTIVE REPAIR STUDY

HOW DIYERS DEFINE THEMSELVES
We called 2,000 of them every week for 20 weeks and
asked them to define themselves as either a "DIYer" or a
"non-DIYer" based on the frequency of their car repairs.

Age 35

Gender 50%

Education 50%

Income 50%

Occupation 50%

Marital Status 50%

Number of Children 50%

Number of Vehicles 50%

Number of Years Driving 50%

Number of Years in Current Residence 50%

Number of Years in Current Job 50%

Number of Years in Current City 50%

Number of Years in Current State 50%

Number of Years in Current Country 50%

Number of Years in Current Continent 50%

Number of Years in Current Hemisphere 50%

Number of Years in Current Galaxy 50%

Number of Years in Current Universe 50%

Number of Years in Current Multiverse 50%

Number of Years in Current Omniverse 50%

Number of Years in Current Metaverse 50%

Number of Years in Current Prime Universe 50%

Number of Years in Current Ultimate Universe 50%

Number of Years in Current Absolute Universe 50%

Number of Years in Current Infinite Universe 50%

Number of Years in Current Eternal Universe 50%

Number of Years in Current Everlasting Universe 50%

Number of Years in Current Immortal Universe 50%

Number of Years in Current Undying Universe 50%

Number of Years in Current Ageless Universe 50%

Number of Years in Current Timeless Universe 50%

Number of Years in Current Immortality Universe 50%

Number of Years in Current Eternity Universe 50%

Number of Years in Current Forever Universe 50%

Number of Years in Current Always Universe 50%

Number of Years in Current Always Universe 50%

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A tale of two markets: one sold and the other to sell

The last time that automotive repair was a hot topic was in the early 1980s, when the Consumer Electronics Association (CEA) and the National Automobile Dealers Association (NADA) fought a bitter battle over the issue of car repairs.

At the time, the CEA argued that car repairs were a "consumer service" and should be handled by the CEA, while the NADA argued that car repairs were a "business service" and should be handled by the NADA. The CEA's argument was based on the fact that car repairs were a "consumer service" and should be handled by the CEA, while the NADA's argument was based on the fact that car repairs were a "business service" and should be handled by the NADA.

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Women Drivers

When it comes to car repairs, women are a key demographic group. In fact, 35% of all car repairs are done by women. This is a significant increase from the 25% of car repairs done by women in 1980.

However, when it comes to car repairs, women are a key demographic group. In fact, 35% of all car repairs are done by women. This is a significant increase from the 25% of car repairs done by women in 1980.

Women DIYers act in much the same way as male DIYers. Most of the women DIYers, 65% do from one to five hours of automotive DIY work a month. In terms of education, male and female DIYers tend to be very similar. A considerably larger percentage of female DIYers are white-collar workers, especially clerks, professionals, and service workers, than male DIYers.

Female DIYers tend to make less money than their male counterparts will. In the DIY group with household incomes of less than \$25,000 annually, 65% are women. In households with annual incomes of more than \$25,000, only 25% are women.

Female DIYers also tend to be younger than male DIYers. In the 18 to 24-year-old group of DIYers, 35% are women. In the 25 to 34-year-old group, 25% are women.

Shopping Patterns

Women don't shop for car parts stores as much as men. In fact, 50% of all car parts stores are visited by men, while only 25% are visited by women. This is a significant difference from the 50% of car parts stores visited by men and 25% visited by women in 1980.

Certain car brands are more popular with women than others. In fact, 50% of all car repairs are done on Ford cars, while only 25% are done on Ford cars in 1980.

by P. Royall Katcher, Business Editor,
John Wirebach, Senior News &
Features Editor, and
Gail Krueger-Nicholson,
Managing Editor

INTRODUCTION

CONSUMER AUTOMOTIVE REPAIR STUDY

Women want to learn how to do their own car maintenance work, at least the relatively simple jobs. Some 37% of female DIYers wanted to learn how to change their vehicle's oil and filter, and 5% of female DIYers want to learn how to change their tires. Women also want to learn how to clean, adjust, or replace their car's engine.

On the other hand, women were considerably less interested than male DIYers in learning how to replace windows, rebuild engines, repair transmissions, or do electrical work.

Serious DIYers

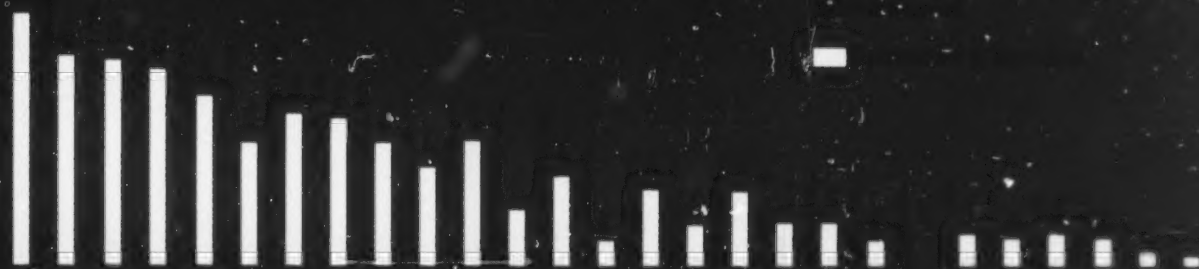
We call those DIYers who say they put 11 or more hours a month into automotive maintenance and repair work "serious DIYers." They represent a major market in any aftermarket retailer.

In all the households in which a vehicle was owned, 4% of the respondents were serious DIYers. All of the serious DIYers are responsible for the care and maintenance of a vehicle. Most of these serious DIYers, 42%, are men.

The largest single age group of serious DIYers, 36%, is the 25-34-year-old group. Half of them actually spend between 11 and 25 hours a month on automotive DIY jobs. But, another 14% spend between 26 and 75 hours a month on their DIY jobs.

Not all of these do their automotive DIY work as a hobby. In fact, slightly less than half, 47%, say they enjoy car and/or DIY work either "a great deal" or "a lot."

Significantly larger percentages of this group face automotive problems than the average full group. For example, 40% of serious DIYers report headlights, tail lights, or auxiliary lights as opposed to 30% of all DIYers who bought these products. In all, 26% more of them bought automotive fluids or maintenance oil than all DIYers.



INTRODUCTION

CONSUMER AUTOMOTIVE REPAIR STUDY

WHAT WOULD DYERS LIKE TO LEARN MORE ABOUT?

We asked Dyers if they could learn to do one more automotive DIY job what it would be.

Tune-ups	13%
Oil Change	8
Rebuilding Engine	7
Body Work	6
Brake Installation	5
Electrical System	5
Engine Maintenance	3
Transmission Repairs	3
Fuel Injector Maintenance	2
Rebuilding Transmissions	2
Valve Repairs	1
Rebuilding Carburetors	1
Maintaining Electronics	1
Changing Tires	1
Setting Timing	1
Air Conditioning Repair	1
Muffler Installation	1

Source: 1990 Automotive Marketing Consumer Automotive Repair Study. Percentages may not total to 100% due to rounding and/or multiple answers.

In all, there's a huge gap between the most and the least desired automotive repairs to do this year before the study was conducted. Of all Dyers, however, only 13% thought they were pros. So far, serious Dyers make up a serious market.

What They Do

Interestingly, only half of all serious Dyers want to be "dedicated" Dyers. That is, Dyers who can handle difficult jobs such as rebuilding engines or transmissions. A surprising 50% say they want to do jobs like timing and adjusting their own existing motor oil. The rest fall in between these two extremes.

Still, most of them would like to learn to do some type of automotive DIY job. In all, 10% would like to pick up body work knowledge, 10% want to learn how to rebuild engines, 11% want to know how to repair their transmissions.

And, serious Dyers are more receptive to learning how to do more than one job. Most serious Dyers, more than half, want to learn to do two kinds or take classes on the subject. The same goes for less serious Dyers. Most serious Dyers are more receptive to learning how to do more than one job. Most serious Dyers, more than half, want to learn to do two kinds or take classes on the subject. The same goes for less serious Dyers. Most serious Dyers are more receptive to learning how to do more than one job.

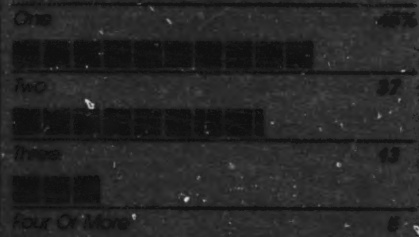
More than half of the serious Dyers wanted to learn to rebuild engines. That's more than 10%. In all, 21% thought an automotive repair should be completed in 20% of all Dyers. Almost half, 40% thought it was desirable to be able to do all of it. That's only a quarter of the total. In all, 21% thought it was desirable to be able to do all of it.

INTRODUCTION

CONSUMER AUTOMOTIVE REPAIR STUDY

HOW MANY VEHICLES DO DRIVERS MAINTAIN?

We asked drivers how many vehicles they were responsible for maintaining.



Source: 1992 Automotive Marketing Consumer Automotive Repair Study. Percentages may not total 100% due to rounding and multiple entries.

As the automotive industry continues to grow, the number of vehicles owned by individuals is also increasing. This study was conducted to determine how many vehicles drivers are responsible for maintaining. The results show that 48% of drivers maintain one vehicle, 37% maintain two, 13% maintain three, and 2% maintain four or more. This information is valuable for automotive marketers as it helps them understand the needs and preferences of different segments of the driving population.

STUDY METHODOLOGY

The study was conducted using a random sample of drivers. The sample was selected from a list of registered vehicles in the state. The drivers were contacted by mail and asked to complete a questionnaire.

The questionnaire asked drivers to provide information about their vehicles, including the make, model, and year. It also asked drivers to indicate how many vehicles they were responsible for maintaining. The questionnaire was mailed to the drivers and they were given two weeks to return it. The response rate was 65%.

The results of the study are presented in the following table. The table shows the number of vehicles maintained by drivers, the percentage of drivers who maintain that number of vehicles, and the total number of vehicles maintained.

As shown in the table, 48% of drivers maintain one vehicle, 37% maintain two, 13% maintain three, and 2% maintain four or more. The total number of vehicles maintained is 1.17 per driver. This information is valuable for automotive marketers as it helps them understand the needs and preferences of different segments of the driving population.

The study also found that drivers who maintain more than one vehicle are more likely to be responsible for maintaining a larger number of vehicles. For example, 13% of drivers maintain three vehicles, while 2% maintain four or more. This information is valuable for automotive marketers as it helps them understand the needs and preferences of different segments of the driving population.

The study was conducted by the Automotive Marketing Research Center. The center is a non-profit organization that provides research and marketing services to the automotive industry. The center's research is based on a national database of registered vehicles and drivers. The center's research is used by automotive marketers to develop marketing strategies and to understand the needs and preferences of the driving population.

BATTERIES

WHY THEY BOUGHT WHERE THEY DID

We asked DIYers why they bought batteries where they did. Most mentioned price.

Price 68%
Convenient Location 27%
Product Selection 16%
Brand Name 11%
Guarantee 6%
Habit 4%

Batteries ranked number 13 on our list of studied products. Some 38% of DIYers surveyed purchased automotive batteries and 29% of those DIYers both purchased and installed them.

Of the DIYers who purchased and installed batteries, 87% were males. Of the very few battery DIYers, just 10%, who had another battery installed by someone other than themselves during the previous year, 66% were male while 34% were female.

The reasons for having someone else install the battery ranged from already having the car in for service, 32%, to no time to do it, 28%, to bad weather, 5%. Of DIYers who had someone else put the battery in, 23% had it done at an automotive parts store, 18% had it done at a gas station, and another 18% had it done at a car dealership.

Generally, battery DIYers are between 25-to-34-years-old, 31%, spend between one and five hours a month working on their car, 58%, and are responsible for at least two cars, 45%. Some 45% of battery DIYers said they were increasing their level of DIY activity. ■

WHAT THEY BOUGHT BATTERIES FOR

We asked DIYers what type of vehicle they bought the battery for. Most bought for a car.

Car 64%
Light Truck 21%
More Than 1 Vehicle 11%
Van 4%
Heavy Vehicle 3%

WHERE DIYERS BOUGHT BATTERIES

We asked DIYers where they bought batteries. Most bought at automotive parts stores.

Automotive Parts Store 45%
Department Store 23%
Discount Store 19%
Gas Station 12%
Specialty Repair Shop 3%
Wholesaler 1%
Car Dealership 1%

MOTOR OIL

WHY THEY BOUGHT WHERE THEY DID

We asked DIYers why they bought motor oil where they did. Most mentioned price, 64%. Convenient Location 43%. Product Selection 11%. Brand Name 8%. Helpful Store Personnel 2%.

Motor oil got a double number one ranking as the most purchased and most purchased and installed product. Some 92% of all DIYers surveyed purchased motor oil and 81% of them poured it in their vehicles themselves.

Some 76% of motor oil DIYers were men, and of those men, 66% installed the oil themselves. Of the 24% female oil DIYers, 34% installed the oil themselves.

Motor oil DIYers are almost evenly spread across all household income levels with 26% making less than \$20,000; 18% making between \$20,000 and \$30,000; 22% making between \$30,000 and \$40,000; and 27% making more than \$40,000.

Most of these DIYers, 64%, work on their cars one to five hours a month; 40% are responsible for one vehicle; and 38% increased their DIY involvement.

Of the 44% of oil DIYers who also had oil installed by someone else, 66% had it installed at specialty repair shop, 36% at a gas station, 30%.

DID THEY ALSO HAVE SOMEONE ELSE DO IT?

We asked DIYers if they had motor oil installed by someone else or at some place also within the past year. Most hadn't. No 55%. Yes 44%.

WHAT THEY BOUGHT MOTOR OIL FOR

We asked DIYers what type of vehicle they bought the motor oil for. Most bought for a car, 68%. More Than 1 Vehicle 19%. Light Truck 10%. Van 3%. Utility Vehicle 2%.

WHERE DIYERS BOUGHT MOTOR OIL

We asked DIYers where they bought motor oil. Most bought at automotive parts stores, 40%. Automobile Parts Store 40%. Discount Store 28%. Gas Station 19%. Department Store 10%. Supermarket 5%. Hardware Store 2%. Convenience Store 2%.

FILTERS

WHY THEY BOUGHT WHERE THEY DID

We asked DIYers why they bought oil or air filters where they did. Most mentioned

52%
39
19 9 6 4
Price
Convenient Location
Product Selection
Brand Name
Habit
Helpful Store
Personnel

Filters were second only to motor oil in being the most purchased products of those we studied. Eighty-five percent of all DIYers bought a filter. However, only 63% both purchased and installed filters, dropping the category to the number three purchased and installed position behind motor oil and anti-freeze/coolant.

The percentage of filter DIYers declined slightly with age. Just over 50% of DIYers over 55-years-old both purchased and installed filters. However, rather surprisingly, a lower percentage of those making under \$20,000 buy and install filters than those making over \$20,000.

Price, 53%, and convenience, 39%, were the key factors for DIYers in deciding where to buy filters. But among the youngest age group, convenience actually scored higher than price. The number one reason for DIY work was "to save money."

Some 29% of DIYers had filters installed by someone other than themselves during the previous year. Of these, 41% went to specialty installers for filters.

DID THEY ALSO HAVE SOMEONE ELSE DO IT?

71%
29
No
Yes

WHERE DIYERS BOUGHT FILTERS

We asked DIYers where they bought oil or air filters. Most bought at automobile parts stores.

60%
21 1 6 2 1 1
Automotive Parts Store
Discount Store
Department Store
Car Dealership
Gas Station
Specialty Repair Shop
Drug Store

WHAT THEY BOUGHT FILTERS FOR

We asked DIYers what type of vehicle they bought the oil or air filters for. Most bought for a

60%
28 1 2 1
Car
Light Truck
Van
Utility Vehicle

ANTIFREEZE COOLANT

WHY THEY BOUGHT WHERE THEY DID

We asked DIYers why they bought antifreeze/coolant where they did. Most mentioned price. Convenient Location 44%
Product Selection 63%
Habit
Brand Name
Helpful Store Personnel

Some 72% of CARS DIYers purchased antifreeze/coolant, a percentage only surpassed by motor oil and filters. There was only a slight drop, from 72% to 63%, when it came to purchase and installation of the antifreeze/coolant.

There is little difference between men and women antifreeze/coolant DIYers in terms of purchasing vs. purchasing and installing. However, 78% of all antifreeze/coolant DIYers were men.

There is also little difference in income or age among antifreeze/coolant DIYers. However, some 73% of DIYers who purchased and installed antifreeze/coolant have increased their automotive DIY work.

Only 11% of all DIYers who bought antifreeze/coolant also had the product installed professionally installed during the previous year. Most of them had the product installed at gas stations and car dealers; most of it was done while the vehicle was in for other work. ■

WHAT THE ANTIFREEZE/COOLANT WAS BOUGHT FOR

We asked DIYers what type of vehicle they bought the antifreeze/coolant for. Most bought for a car. 65%
More Than 1 Vehicle
Light Truck
Van
Utility Vehicle

DID THEY ALSO HAVE SOMEONE ELSE DO IT?

We asked DIYers if they had antifreeze/coolant installed by someone else at some place else in the past year. Most had it done. 80%
No
Yes

WHERE DIYERS BOUGHT ANTIFREEZE/ COOLANT

We asked DIYers where they bought antifreeze/coolant. Most bought at automobile parts stores. 45%
Automotive Parts Store
Parts Store
Discount Store
Department Store
Gas Station
Supermarket
Hardware Store
Drug Store

WAX / POLISH

WHY THEY BOUGHT WHERE THEY DID

We asked DIYers why they bought wax or polish where they did. Most mentioned:

- Price 49%
- Convenient Location 46%
- Product Selection 46%
- Brand Name 17%
- Habit 9%
- Helpful Store Personnel 2%

Wax or polish products earned equal rankings, fourth, in both our "purchased" and "purchased and installed" categories. Men and women tended to buy the products about equally, with 65% of male DIYers and 63% of female DIYers buying wax or polish.

When it came to applying wax or polish products, however, only 56% of women did so, while almost all the men who bought wax or polish applied it themselves.

Wax or polish DIYers tend to make more than \$30,000 in annual household income; be between 25 and 44 years of age; spend between one and five hours a month on automotive DIY and be responsible for one or two vehicles.

Of the 14% of wax or polish DIYers who also had wax or polish applied during the previous year by someone other than themselves, most did so because they were too busy or didn't have enough time to do the job.

DID THEY ALSO HAVE SOMEONE ELSE DO IT?

We asked DIYers if they had had wax or polish applied by someone else or at a car wash (also had wax or polish applied).

- No 66%
- Yes 14%

WHAT THEY BOUGHT WAX OR POLISH FOR

We asked what type of vehicle they bought wax or polish for. Most bought for a:

- Car 65%
- Truck 19%
- Van 10%
- Other 6%

WHERE DIYERS BOUGHT WAX OR POLISH

We asked DIYers where they bought wax or polish. Most bought at automobile parts stores.

- Automotive Store 43%
- Discount Store 29%
- Department Store 19%
- Drug Store 10%
- Supermarket 10%
- Hardware Store 10%
- Gas Station 10%

FUNCTIONAL FLUIDS

WHY THEY BOUGHT WHERE THEY DID

We asked DIYers why they bought maintenance chemicals or functional fluids where they did. Most said that the store was the most convenient one at the time.

Convenient Location 52%
Price 51%
Product Selection 51%
Habit 49%
Brand Name 48%
Helpful Store Personnel 47%

We defined functional fluids or maintenance chemicals as brake fluid, power steering fluid, transmission fluid, and carburetor sprays. We found that 61% of DIYers had purchased some kind of functional fluid and 53% had both purchased and installed one of the fluids. Functional fluids were thus the fifth most popular DIY project on the study.

Virtually all the men who bought functional fluids, 68%, also installed it themselves. However, while 46% of all women DIYers bought such products, only 29% installed them on their own.

Functional fluid DIYers tend to be between 25 and 44 years of age; make more than \$30,000 annually in household income; and spend between one and five hours a month on automotive DIY. Most are responsible for one or two vehicles.

Some 20% had a fluid installed by someone else during the previous year. Of this group, 36% said this occurred when the vehicle was in for other service.

WHAT THEY BOUGHT MAINTENANCE CHEMICALS/ FUNCTIONAL FLUIDS FOR

We asked DIYers what type of vehicle they bought the maintenance chemicals or functional fluids for. Most bought for a car.

Car 64%
More Than 1 Vehicle 23%
Van 12%
Light Truck 3%
Other Vehicle 2%

WHERE DIYERS BOUGHT MAINTENANCE CHEMICALS/ FUNCTIONAL FLUIDS

We asked DIYers where they bought maintenance chemicals or functional fluids. Most bought at automobile parts stores.

Automotive Parts Store 54%
Discount Store 28%
Gas Station 12%
Department Store 10%
Supermarket 8%
Hardware Store 7%
Convenience Store 6%

TUNE-UP PARTS

WHY THEY BOUGHT WHERE THEY DID

We asked DIYers why they bought tune-up products where they did. Most mentioned price.

Convenient Location
Product Selection
Brand Name
Habit
Helpful Store Personnel

52%

37%

27%

10%

WHAT THEY BOUGHT TUNE-UP PRODUCTS FOR

We asked DIYers what type of vehicle they bought the tune-up products for. Most bought for a car.

More Than 1 Vehicle
Light Truck
Van
Utility Vehicle

61%

17%

12%

8%

Tune-up products—spark plugs, spark plug wires, or other ignition parts—ranked sixth on our list of studied products. Some 59% of DIYers purchased tune-up parts while 40% both purchased and installed these popular products.

Tune-up DIYers are spread just about evenly across all household income brackets with slightly more than a quarter of them, 27%, making more than \$40,000.

Most tune-up DIYers, 45%, are responsible for two vehicles; 29% are responsible for three or more.

Most tune-up DIYers, 63%, say they spend between one and five hours a month on automotive DIY work. A few, 15%, spend 11 hours or more. Some 43% of all tune-up DIYers say they are increasing the amount of DIY work they do.

Of the 19% of these DIYers who also had tune-up products installed by someone else, 34% did so because they lacked time and because they felt someone else did a better job, 32%. Most of those, 28%, who had work done, had it done at a specialty repair shop.

WHERE DIYERS BOUGHT TUNE-UP PRODUCTS

We asked DIYers where they bought tune-up products.

Most stores
Automotive Parts Store
Discount Store
Department Store
Car Dealership
Gas Station
Hardware Store
Specialty Repair Shop

77%

11%

9%

1%

1%

1%

1%

1%

WIPER BLADES

WHY THEY BOUGHT WHERE THEY DID

We asked DIYers why they bought windshield wipers or replacement blades where they did. Most mentioned the store's convenient location 47%.

Convenient Location 47%
Product Selection 39%
Brand Name 33%
Habit 23%
Helpful Store Personnel 13%

Some 57% of DIYers surveyed purchased windshield wipers or wiper blades, making it the seventh most popular purchase. They were, however, the sixth most purchased and installed product as 50% of wiper DIYers put them on their vehicles themselves.

Most, 62%, of the men who bought wipers or wiper blades also installed them. However, while 47% of all women DIYers bought them, only 30% installed them themselves.

Wipers and wiper blade DIYers tend to be between 25 and 44-years-old; make more than \$30,000 annually in household income; and spend between one and five hours a month on automotive DIY. Most are responsible for maintaining one or two vehicles.

Only 4% of these DIYers had wipers installed by someone other than themselves during the previous year. Most of this group had it done because they were just too busy to do it themselves.

DID THEY ALSO HAVE SOMEONE ELSE DO IT?

We asked DIYers if they had windshield wipers or replacement blades installed by someone else in the past year. Most hadn't.

No 96%
Yes 4%

WHAT THEY BOUGHT WIPERS OR BLADES FOR

We asked DIYers what type of vehicle they bought the windshield wiper or replacement blades for. Most bought for a car.

Car 68%
Light Truck 15%
Van 13%
Other Vehicle 7%

WHERE DIYERS BOUGHT WIPERS OR BLADES

We asked DIYers where they bought windshield wipers or replacement blades. Most bought at automobile parts stores.

Automobile Parts Store 55%
Department Store 15%
Gas Station 13%
Supermarket 10%
Specialty Repair Shop 7%

PROTECTANTS

WHY THEY BOUGHT WHERE THEY DID

We asked DIYers why they bought other appearance chemicals or protectants where they did. Most mentioned price.

51%

48

16

7

4

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In all, the products we call "other appearance chemicals or protectants"—products such as vinyl cleaners or rubber bumper restorers—were the eighth most widely purchased and seventh most widely purchased and installed of all those products studied.

Virtually all the men who bought other appearance chemicals or protectants, 52%, also applied them. However, while 43% of all women DIYers bought such products, only 35% applied them themselves.

Other appearance chemical or protectants DIYers tend to be between 25 and 44 years of age; make more than \$30,000 annually in household income; and spend between one and six hours a month on automotive DIY. Most are responsible for maintaining one or two vehicles.

Only 7% had other appearance chemicals or protectants applied by someone besides themselves during the previous year. Most had it done because they were too busy to do it themselves.

DO THEY ALSO HAVE SOMEONE ELSE DO IT?

We asked DIYers if they had other appearance chemicals or protectants applied by someone else in the past year. Most said No.

93%

7

WHAT THEY BOUGHT PROTECTANTS FOR

We asked DIYers what type of vehicle they bought the other appearance chemicals or protectants for. Most bought for a car.

85%

21

7

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WHERE DIYERS BOUGHT PROTECTANTS

We asked DIYers where they bought other appearance chemicals or protectants. Most bought at automobile parts stores.

58%

9

8

7

6

5

4

3

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LIGHTS

WHY THEY BOUGHT WHERE THEY DID

We asked DIYers why they bought lighting products where they did. Most mentioned price. 45%
 Convenient Location 43%
 Product Selection 43%
 Habit 43%
 Brand Name 43%
 Helpful Store Personnel 43%

WHAT THEY BOUGHT LIGHTING FOR

We asked DIYers what type of vehicle they bought lighting products for. Most bought for Car. 71%
 Light Truck 71%
 More Than 1 Vehicle 71%
 Van 71%
 Utility Vehicle 71%

WHERE DIYERS BOUGHT LIGHTING

We asked DIYers where they bought lighting products. Most bought at automobile parts stores. 82%
 Automobile Parts Store 82%
 Petrol Store 82%
 Discount Store 82%
 Department Store 82%
 Car Dealership 82%
 Junk Yard 82%
 Gas Station 82%
 Hardware Store 82%

Headlights and tail lights, as one category, were the ninth most purchased and tenth most purchased and DIYer-installed product of the 27 products that we studied.

In all, 89% of headlight or tail light purchasers were men; 62% were between the ages of 25 and 44; half had household incomes of more than \$30,000 annually; 63% spent between one and five hours a month on automotive DIY; and 43% maintained two vehicles.

Only 5% had headlights or tail lights installed by someone else, in addition to themselves, in the year prior to the study. Female DIYers outnumbered male DIYers in that group. Of that entire group, 41% had the job done at a gas station, while 33% went back to their car dealer for the job. "The car was already there for service," was the reason 30% gave for having this job done elsewhere. That was the single most stated reason. ■

COOLING SYSTEM PRODUCTS

WHY THEY BOUGHT WHERE THEY DID

We asked DIYers why they bought cooling system products where they did. Most went to the most convenient source.

Convenient Location 41%
Price 38%
Product Selection 21%
Brand Name 16%
Habit 12%
Helpful Store Personnel 10%

WHAT THEY BOUGHT COOLING PRODUCTS FOR

We asked DIYers what type of vehicle they bought the cooling system products for. Most bought for a car.

Car 68%
Light Truck 17%
Van 12%
Utility Vehicle 3%

Cooling system parts, such as hoses, thermostats, and clamps, were the 10th most purchased and 11th most purchased and installed of all automotive products we studied.

Few, only 9%, of women DIYers installed their own cooling system parts. As well, only 13% of cooling system part installers were more than 55-years-old. There was, however, little difference in cooling system parts DIYers when studied by income. Almost half of cooling system part installers plan to increase the level of their automotive DIY.

Only 10% of DIYers who installed some cooling system part during the previous year also had a cooling system part installed by someone else during the same time period. Of them, the largest group, 30%, had their gas station install the part. Only 13% had the work done at an automotive parts store.

The most cited reasons for having the job done elsewhere were lack of time, 21%, and the belief that the other installer did it better, 22%. ■

DID THEY ALSO HAVE A CLAMP DO IT?

We asked DIYers if they had ever had a clamp installed by someone else. Most said no.

No 78%
Yes 22%

WHERE DIYERS BOUGHT COOLING PRODUCTS

We asked DIYers where they bought cooling system products. Most bought at automotive parts stores.

Automotive Parts Store 78%
Discount Store 9%
Car Dealership 9%
Gas Station 2%
Specialty Repair Shop 1%
Junk Yard 1%

GAS & OIL ADDITIVES

WHY THEY BOUGHT WHERE THEY DID

We asked DIYers why they bought oil or gas additives where they did. Most said they bought from the most convenient location.

Convenient Location	52%
Price	44%
Product Selection	13%
Brand Name	7%
Habit	5%
Helpful Store Personnel	5%

Oil or gas additives were the 11th most purchased products of the products we studied. They were, however, the seventh most purchased and installed product.

Virtually all the men who bought oil or gas additives, 44%, also installed them. However, while 38% of all women DIYers bought them, only 34% installed them themselves.

Oil or gas additive DIYers tend to be between 25 and 44 years of age; make more than \$30,000 annually in household income; and spend between one and five hours a month on automotive DIY. Most are responsible for maintaining one or two vehicles.

Some 11% of these DIYers had additives installed by someone other than themselves during the previous year. Most of this group had it done because they were just too busy to do it themselves. A slightly smaller group had additives installed professionally when the vehicle was already in a shop for service. But most did it themselves.

WHAT THEY BOUGHT ADDITIVES FOR

We asked DIYers what type of vehicle they bought the oil or gas additives for. Most bought for a car.

Car	68%
More Than 1 Vehicle	19%
Light Truck	1%
Van	1%
Utility Vehicle	1%

WHERE DIYERS BOUGHT ADDITIVES

We asked DIYers where they bought oil or gas additives. Most bought at automobile parts stores.

Automotive Parts Store	41%
Discount Store	17%
Gas Station	17%
Department Store	17%
Supermarket	17%
Convenience Store	17%
Car Dealer	17%

WHY DID THEY INSTALL ADDITIVES THEMSELVES

We asked DIYers why they installed oil or gas additives. Most said they wanted to save money.

To Save Money	57%
To Keep Engine Running Smoothly	17%
To Prevent The Lubrication System From Getting Dirty	17%
To Keep The Oil Clean	17%
To Keep The Oil From Getting Too Thick	17%

BRAKES

WHY THEY BOUGHT WHERE THEY DID

We asked DIYers why they bought brake products where they did. Most mentioned

49%
32
23
11
65

Price
Convenient Location
Product Selection
Habit
Helpful Store
Personal Brand Name

Brakes ranked 12th on our list of studied products with 39% of DIYers buying them and 17% of DIYers purchasing and installing the products.

DIY brake work is almost exclusively a task for male DIYers—only 5% of brake DIYers were female. Of brake DIYers, 37% fell into the 25-to-35-years-old age category and into the less than \$20,000 household income category, 27%.

Brake DIYers are very involved in automotive DIY work. Some 53% spend one to five hours a month on DIY work while 24% spend six to ten hours on DIY work. And 47% of brake DIYers are responsible for maintaining two vehicles while 33% maintain three or more. Of brake DIYers, 46% said their level of DIY involvement was increasing.

Almost all brake DIYers, 91%, said they did not have anyone else install brakes for them during the previous year. Of the few DIYers did, 9%, of them, 24%, had the work done at a gas station. The reason most cited for having brake work done was "not enough time."

WHAT THEY BOUGHT BRAKES FOR

We asked DIYers what type of vehicle they bought the brake products for. Most bought for a

72%
19
-28

Car
Light Truck
More Than 1 Vehicle
Van
Utility Vehicle

WHY DID THEY INSTALL BRAKES THEMSELVES

We asked DIYers why they installed brakes themselves. Most cited

WHERE DIYERS BOUGHT BRAKES

We asked DIYers where they bought brake products. Most bought at automobile parts

96%
21
11
10
0

stores
Automotive Parts Store
Car Dealership
Specialty Repair Shop
Department Store
Gas Station
Wholesaler
Discount Store

EXHAUST PRODUCTS

WHY THEY BOUGHT WHERE THEY DID

We asked DIYers why they bought exhaust products where they did. Most mentioned price.

Price	49%
Convenient Location	28%
Product Selection	35%
Brand Name	
Helpful Store Personnel	
Habit	

Just over a quarter, 27%, of all DIYers purchased some kind of exhaust product whether it was a muffler, a pipe, or a catalytic converter. However, very few of these buyers actually installed the exhaust system product; the purchased and installed rate fell to 7%.

Some 96% of exhaust system DIYers were men. About 57% were under 35-years-old. Exhaust DIYers are almost evenly spread across all household income levels with 23% making less than \$20,000; 19% making between \$20,000 and \$30,000; 20% making between \$30,000 and \$40,000; and 32% making more than \$40,000.

Most of these DIYers, 54%, work on their cars one to five hours a month; 86% are responsible for more than one vehicle; and 51% of increased their DIY involvement.

Of the 16% of exhaust DIYers who also had an exhaust part installed by someone else, 64% had it installed at a specialty repair shop. Most of those had it done by someone else because they were simply too busy to do the job.

WHERE DIYERS BOUGHT EXHAUST PRODUCTS

We asked DIYers where they bought exhaust products. Most bought at automobile parts stores.

Automotive Parts Store	68%
Specialty Repair Shop	12%
Discount Store	
Department Store	
Car Dealership	
Gas Station	
Wholesaler	

RIDE CONTROL

WHY THEY BOUGHT WHERE THEY DID

We asked DIYers why they bought ride control products including shocks, struts or springs, where they did. Most mentioned price.

Convenient Location 80%
Product Selection 23%
Brand Name 12%
Habit 10%
Helpful Store Personnel 9%

Some 23% of the DIYers purchased ride control products, a category that includes shocks, struts and springs. Some 12% both purchased and installed the ride control products.

The installers were virtually all men, 96%, with almost two-thirds of the installers falling between 25 and 44 years of age. Some 90% of the installers owned two or more vehicles and 51% said their DIY involvement had increased in the past year.

Price was the key in selecting where to purchase ride control products. Those who installed ride control products did so mainly to save money. However, 23% said they installed their own because it was easy to do.

Some 9% had ride control products installed by someone in addition to themselves during the previous year. Most of this group had it done because they were just too busy to do it themselves. Discount stores were the favorite place to have the installation done with 38% going to one.

WHERE DIYERS BOUGHT RIDE CONTROL PRODUCTS

We asked DIYers where they bought ride control products including shocks, struts or springs. Most bought at auto parts stores.

Automotive Parts Store 65%
Discount Store 10%
Department Store 9%
Car Dealership 2%
Catalog/Mail Order 1%
Specialty Repair Shop 1%
Gas Station 1%

WHAT THEY BOUGHT RIDE CONTROL PRODUCTS FOR

We asked DIYers why they bought ride control products for. Most mentioned a leak.

Leak 80%
Light Truck 23%
More Than 1 Vehicle 12%
Last Vehicle 10%
Last Year 9%

P A I N T

WHY THEY BOUGHT WHERE THEY DID

We asked DIYers why they bought paint where they did. Almost half said they needed to match a specific color.

Product Selection	49%
Convenient Location	32%
Price	24%
Habit	17%
Brand Name	15%
Helpful Store Personnel	13%

Paint was the 19th most purchased but the 14th most purchased and installed product we studied.

Paint is a product that is relatively often used by women DIYers, with 20% of all paint DIYers being female. As well, the use of touch-up paint also increases with household income. In all, 17% of paint DIYers had household incomes of less than \$20,000 annually bought and applied paint, while 30% of all paint DIYers made more than \$40,000 annually.

Paint was also relatively often applied by someone other than the paint DIYer. In all, 14% of those who bought and applied paint, had paint applied by someone else during the same year before the study. Car dealerships, at 33% of this group, got the largest share of paint jobs for this group. And, they got it because the DIYers thought the car dealers or other professional shops would do a better job than they could themselves.

WHAT THEY BOUGHT PAINT FOR

We asked DIYers what type of vehicle they bought the paint for. Most bought for a car.

Car	61%
Light Truck	15%
Van	10%
More Than 1 Vehicle	14%

WHERE DIYERS BOUGHT PAINT

We asked DIYers where they bought paint. Half bought at automobile parts stores.

Automobile Parts Store	50%
Car Dealership	15%
Discount Store	10%
Hardware Store	9%
Department Store	8%
Body Shop	7%
Specialty Repair Shop	2%

AUTO REPAIR BOOKS

WHY THEY BOUGHT WHERE THEY DID

We asked DIYers why they bought automotive books or manuals where they did. Most were interested in a wide selection of titles.

Product Selection

Price

Convenient Location

Brand Name

Had It

Needed It

49%

14%

21%

10%

6%

4%

2%

1%

1%

1%

1%

1%

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Automotive repair books—books ADIYers can refer to for help as they work on their vehicles—rank 21st on our list of studied products. Some 13% of all DIYers purchased an automotive repair manual.

Almost all, 80%, of automotive book purchasers were male. Some 31% of book purchasers were between 25 and 34-years-old and 33% had incomes of \$40,000 or more.

Most of the book purchasers, 57%, work on their vehicles between one and five hours a month. Some, 22%, did more—they worked on their vehicles 11 hours or more per month.

Of automotive book purchasers, 38% were responsible for at least two vehicles and 35% were responsible for three or more vehicles.

Most automotive book purchasers, 47%, said they had increased the amount of automotive DIY work they do. ■

WHAT THEY BOUGHT AUTO BOOKS FOR

We asked DIYers what they bought automotive books or manuals for. Most were interested in a wide selection of titles.

Product Selection

Price

Convenient Location

Brand Name

Had It

Needed It

49%

14%

21%

10%

6%

4%

2%

1%

1%

1%

1%

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WHERE DIYERS BOUGHT AUTO BOOKS

We asked DIYers where they bought automotive books or manuals. Most were interested in a wide selection of titles.

Product Selection

Price

Convenient Location

Brand Name

Had It

Needed It

49%

14%

21%

10%

6%

4%

2%

1%

1%

1%

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SEAT COVERS

WHY THEY BOUGHT WHERE THEY DID

We asked DIYers why they bought seat covers where they did. Most mentioned

Price 65%
Product Selection 31
Convenient Location 20
Habit 2
Helpful Store Personnel 1
On Sale 1

Out of the 27 products we studied, seat covers were the 24th most purchased. These are one of the most DIYable products on our study with only 1% of those who bought seat covers not installing them themselves.

There is little difference between men and women seat cover DIYers in terms of purchasing vs. purchasing and installing.

Half the DIYers who purchased and installed seat covers also plan to increase their automotive DIY work. The fact that most seat cover DIYers bought average quality may indicate they are maintaining older cars that require more automotive products than newer ones.

Only 2% of all DIYers who bought seat covers had another set of seat covers professionally installed during the previous year. Most of them had the covers installed at specialty shops; all of them had the professional work done because they "wanted it done right."

WHY THEY BOUGHT SEAT COVERS FOR THEIR TRUCK

Most truck seat cover buyers said they bought for a

WHERE DIYERS BOUGHT SEAT COVERS

We asked DIYers where they bought seat covers. The most popular place was the discount store, although almost

55%
20
15
10
5
1

EMPLOYEES

AS THE WORK FORCE CHANGES WHO WILL YOU HIRE?

A non-traditional work force will mean non-traditional ways of recruiting and hiring for aftermarket retailers.

by Gall Krueger-Nicholson,
Managing Editor

There is a change taking place in aftermarket retailing. That change has nothing to do with parts proliferation or new car technology. The change has to do with the people who staff your stores; the people behind your cash registers, in your stock room, and on your sales floor.

Chances are, if you looked around your store ten or 15 years ago, you would have seen a bunch of fresh-faced, high school and college-aged young men with cars on their minds.

Look around your store today. What do you see? If you are like 66% of our 1989 Automotive Marketing Retail Panel, the first thing you see is fewer faces. There are empty places where employees have been. This is the result of a shrinking labor pool, particularly the end of the pool that used to contain the young white males who made up the bulk of the aftermarket hourly work force.

According to U.S. Department of Labor statistics, the population and labor force are growing at the slowest rate in de-

cadec. In fact, between now and the year 2000, the labor force may grow at only about one-half the rate of the 1980s.

The number of 16 to 24-years-olds, traditionally entry-level retail employees, has declined. By the year 2000, these people will represent a mere 16% of the work force. Almost three quarters, 73%, of the work force will be between the ages of 25 and 54 at the start of the next century.

So, what does this mean to you?

It means the worker shortage is not short-term. While there is a steady supply of retail jobs to fill, there are fewer of the types of individuals you are used to hiring applying for them. It means that in order to get by, aftermarket retailers will have to take a closer look at their employee situation now—and for the future—and make some significant changes in their hiring practices.

Whom Will You Hire?

So, whom will you hire in the 1990s? More women, more minorities, and more older workers are the likely candidates.

According to a report from the Hudson Institute, an Indianapolis, IN, think tank, only 15% of people joining the work force between now and the year 2000 will be white males. Almost one half, 42%, of new workers will be white females. Working women will represent 47% of the nation's labor force by the year 2000.

The number of minority workers in the labor force will also rise. The Hudson report also noted that 43% of new workers over the next few years will be non-whites or immigrants, both male and female.

Another population group that is on the rise is the over 65-years-old segment. Many of these people are opting for early retirements and are leaving the labor pool. But, many return as part-time workers.

The above groups—women, minorities, and retirees—represent areas of the population that have not been fully tapped by retailers looking for employees. The potential is there. But, the same recruitment and hiring techniques that got you good employees in the past may not work today.

These groups of potential employees have different needs and will have to be reached in different ways. We will explore their potential as aftermarket employees and how to reach them in future articles. ■

COPING WITH THE LABOR SHORTAGE

A study by Management Horizons, Dublin, OH, a division of Price Waterhouse, lists techniques some retailers use to cope with the shrinking labor pool and still get the best from their employees. Basically, the techniques involve being better employers.

Improve Corporate Culture

1 Show clear evidence of positive top management involvement. Be seen on the sales floor.

2 Change the way top management thinks of and refers to store hourly labor. Make sure the attitude is positive.

3 Evaluate leadership style, recognizes that the best organizations feature mutual respect, open communications, understanding, and acceptance of authority.

4 Establish hiring profiles and policies. Seek out extroverts and people-oriented employees, or employees with special extra skills like computer literacy, or employees with certain specific characteristics.

5 Direct extended training program to education development, not just routine store tasks.

Improve Job Tasks

1 If the job is important to keeping your store in business, pay accordingly.

2 Introduce variability and diversity into each worker's job to reduce boredom.

3 Increase difficulty and complexity of tasks with tenure and pay. Expect more, and you will get more.

4 Use mechanical or computer technology to replace the mundane tasks in each job; enlarge the job into other areas as a result.

5 Shift simple tasks from store help to shoppers whenever possible through self-service techniques.

1990 RETAIL EMPLOYEE REQUIREMENTS

As this chart shows, there will likely be a 20.2% short-fall of retail employees aged 16 to 24 this year. These young people are normally the primary first-time employees who staff many retail outlets including those in the aftermarket. There will likely be, however, a 24.1% surplus of retail employees in the 35 to 44-years-old group. Aftermarket retail employers who have trouble keeping their stores staffed would do well to aim their recruitment efforts toward this group.

Worker Age	% Of Sales Workers 1981	Needed In 1990 (000)	Likely To Have In 1990 (000)	(Shortage) Overage
16-24	32.1%	645	515	(20.2%)
25-34	25.3%	708	694	(3.6%)
35-44	18.9%	528	655	24.4%
45-55	15.8%	442	417	(5.7%)
56-65	12.3%	345	356	(25.8%)
65-Up	4.6%	129	113	(12.4%)

Source: Bureau of Labor Statistics & Management Horizons, a division of Price Waterhouse